**Your operating guide to your sleek new 2-week appointment scheduling system**

In July, you will no longer be able to make appointments for patients far out into the future, except for kids under 2 and OB visits. That doesn’t mean that you can’t help your patients get appointments – that just means that they won’t necessarily leave with an appointment. Options for making an appointment for your patient include:

1. Patients can call the appointment unit, particularly 2 weeks prior to the day you want them seen next. Hand the responsibility to the patient for their care.
2. Send a “vulnerable patient” message to the HIM scheduling pool. They will make the patient an appointment for your patient at the time you want. To do this, send an inbasket message to your scheduling pool and type in .vulnerable in the message line. You can ask them to make a f/u appointment whenever you want it made.
3. Tell them to call your care coordinator to make an appointment if they have called the appointment unit and are unable to schedule the requested appointment. (This should be used sparingly for the sanity of your team members)
4. Send yourself a reminder to check in and see if they have an appointment, then consider #2 and #3.

If you would like to know more about your template, read on!

Your clinic rosters during residency are the following:

**R1: 4, increasing to 5 and then 6 throughout the year (panel size of 100)**

**R2: 7, increasing to 8 (panel size of 150)**

**R3: 9 (panel size of 250)**

Your roster includes a few types of slots. Most are either “office visit” or “provider approved”.

**Office visit** are appointments only made by the appointment unit. They are supposed to be saved for patients calling in. The appointment unit generally gives these appointments only for the PCP, so you won’t get others’ patients with some exceptions.

**Provider approved** are the appointments that you can make during clinic. Usually your MA or care coordinator are using these slots to bring patients back that you say you want to see. If either doesn’t fill, it turns into a short notice appointment.

The other visits some of you have are **ED/hospital discharge** appointments and **New OB** appointments. They are pretty self-explanatory.

R3s in Concord also have a homeless appointment because that clinic has a special grant to help take care of our homeless patients.